

A Practical Guide to e-Learning Development Project Management

Organizations are now, for the first time ever, experiencing the widest complexity of learning needs ever – with four different generations of employees together in the workplace, as well as remote employees and virtual work-from-home employees. As a result, training has had to become more sophisticated, more flexible, and more easily accessible. Organizations have looked to e-Learning as an effective way to address these requirements.

Building classroom training is far different than building e-Learning training though. If you are tasked with developing e-Learning internally, you may take some benefit from the following practical information on how to manage an e-Learning development project.

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The approach we'll be sharing in the following pages represents a 13-year proven process that we've used to develop and manage e-Learning development functions for clients around the globe.

Getting Started:

The key to effectively managing your e-Learning project is to first develop an e-Learning Project Management Schedule (PMS).

To do so, start with an Excel spreadsheet (or any project software you may use), and create column headings across the top that clearly identify the following components:

- **Stages:** The overarching stages of the project
- **Activity/Task & Description:** The individual tasks that make up each stage (including task description)
- **Owner:** The person responsible for completion of an activity/task
- **Date Due:** The due date for the activity/task
- **Status:** Started, Waiting, Completed, etc. This is helpful but is optional.

Sample Project Management Schedule

Stage	Item	Description/Details	Owner	Due	Status
1 = PLANNING					
1 = PLANNING	Client Name				
1 = PLANNING	Point of Contact		Client		
1 = PLANNING					
1 = PLANNING					
1 = PLANNING					
1 = PLANNING					
1 = PLANNING					
1 = PLANNING					
1 = PLANNING					
1 = PLANNING					
2 = CONTENT GATHERING & ID					
2 = CONTENT GATHERING	Technical Specs	Review and fill in Technical specs sheet	Client & us		

Once you have determined all the tasks, deadlines, responsible parties, etc. you should

distribute the PMS to all stakeholders in order to get buy-in and sign off. It is **IMPERATIVE** that you do this; do not begin any work until you have buy-in on the details. This will help you deliver the project on time and avoid any misunderstandings with your client.

Project Management Stages:

We recommend breaking your project down into specific sections based on the primary tasks that need to occur in order to move an e-Learning project from development to delivery.

These specific sections, or stages as we call them, break the e-Learning development project into six primary functions.

There six stages of e-Learning development are as follows:

1. Planning
2. Content Gathering and Instructional Design
3. Storyboarding
4. Development/Production
5. Quality Assurance
6. Integration/Delivery

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Stage Descriptions:

Let's look at each of the stages individually and discuss what you need to do in each stage:

1. PLANNING

In this stage you need to gather and document all the basic and primary information such as:

- Name of Project (or Internal Client)
- Point of Contact (the Subject Matter Expert, i.e. "SME")
- Project Number (if applicable)
- Audience
- Date of Planning Meeting
- Start Date
- Due Date

2. CONTENT GATHERING AND INSTRUCTIONAL DESIGN

In this stage you have some preparatory tasks to carry out before you can actually begin working on the project itself.

Keep in mind the following items:

- Discuss with the stakeholders and document all technical specifications (use the lowest common denominator for hardware specs - for client workstations, servers, operating systems, browsers and minimum hardware specifications.)

- Determine any constraints for the project with the client (audio restrictions, Flash restrictions, etc.)
- Gather existing content
- Analyze content provided
 1. Determine content gaps
 2. Develop new content as needed
 3. Present new content developed to SME for review and approval
- Gather graphics, logos and color scheme requirements from client (if applicable). Ideally, the client will provide a style sheet they've created and approved for any development.
- Determine instructional strategy. The instructional strategy specifies how the content will be transformed into an engaging e-learning course. For example, Direct Game-Based Learning, Story-Based Learning by using games, Scenario-Based Learning by using games, Simulations, etc.
- Create a "Design Document". The Design Document serves as the "*blueprint*" for the project. It specifies the content, "look and feel", and instructional design elements of the program. It includes the following sections:
 - Program Overview
 - Intended Audience
 - Instructional Design
 - Program Navigation and Visual Treatment
 - Program Content
 - Program Features

Sample Design Document:

Detailed Design Document

Topic	Detail
Course Title:	Customer Service 101
Delivery Method:	E-learning with flash animated scenarios and audio Interactive with learning checks and activities
Timing:	Approximately 2 hours
Course Focus (Theme):	<ul style="list-style-type: none"> Commitment to Customer Care Participants communicate their commitment to providing a superior customer experience by using effective customer service skills and techniques.
Audience - Service Provisioning Tasks:	<ul style="list-style-type: none"> Answer basic customer inquiries xxx xxx xxx
Course Objectives:	Upon completion of this course, professionals will be able to: Professionally answer a call and greet the customer xxx xxx
Course Outline	E-Learning Introduction and Navigation (5 minutes) Course Introduction (5 minutes) Module 1: Customer Care Techniques (20 minutes) Module 2: xxxxx Module 3: xxxxx
Course Look and Feel:	Standard look and feel for all WBT courses Static panel that includes company logo, course name and course map.
Performance Standards and Performance Support	Job Aids and Checklists Provide generally accepted standards. Each program provides specific performance standards.


Course Design

Module Information	Screens
Title: E-Learning Introduction and Navigation Objectives: NA Timing: 5 minutes	Launch Page Establish "Look and Feel" of the course Welcome Page Welcome Message Navigation Instructions Next Page xxx xxx Helpful Hints Explain how the e-learning course is designed Course Modules xxx xxx
	Module Home Page Click on the desired module Recommend taking the modules in order. May take each module as many times as desired <ul style="list-style-type: none"> Module 1: Customer Care Techniques Module 2: xxx Module 3: xxx Ready to Begin?
Title: Course Introduction Objectives: NA Timing: 5 minutes	Introduction - Course Overview This course provides you with the skills you need to provide a superior customer experience to your customers. Theme: xxx Introduction - The Mission xxx Introduction - Course Objectives Upon completion of this course, you will be able to: Professionally answer a call and greet the customer xxx xxx Transition to Module One
Title: Module 1: Customer Care Techniques Objectives: Upon completion of this module, you will be able to: <ul style="list-style-type: none"> Use superior customer service techniques to respond to customer inquiries. Answer the phone and greet your customer in a professional manner. Place a call on hold and return to the call, if necessary. Timing: 20 minutes	Module Objectives Basic Telephone Courtesies Commitment to Customer Care xxx xxx Call Opening and Greeting Prepare for the call (Positive attitude, smile) xxx Place a call on hold / Return from hold Learning Checkpoint

3. STORYBOARDING

In this stage you will start laying out the content into a design template commonly called a Storyboard. Storyboards document the content and programming instructions as well as voiceover text (if applicable), for each “page” of the course. There are many ways and formats in which you can storyboard; you can use Word, PowerPoint, etc.

Sample Storyboard:



Storyboard :		Page 1 of
<p>Scene</p>	<p>This space is used to draw, write, or animate what the user will see on the screen in this scene. It is exactly what the user will be seeing.</p> <p>For example:</p> <div style="text-align: center; margin-top: 20px;"> <p>COMPANY XYZ</p> <p>SALES PRESENTATION</p> </div>	
<p>This space is used to give explanations and/or production directions for what needs to happen on the screen in this scene.</p> <p>For example:</p> <p>The words on the screen will fly in from the right. The font will be red. Use catchy music as the words appear on screen.</p>	<p>Voiceover:</p> <p>This space is used to write the voiceover that will accompany this screen.</p> <p>For example:</p> <p>Welcome to Company XYZ's Sales Presentation.</p>	

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There are three steps to Storyboarding:

1. **Create storyboard:** You will create the first draft, have the stakeholders review it and make any necessary changes, then deliver the second draft of the storyboard, have the stakeholders review and approve.
2. **Create narration scripts (if applicable):** After you have the final storyboard you can now create the narration scripts for the voiceovers by simple copying the voiceover text from the storyboard into a separate document.
3. **Contact voiceover talent:** Agree on a quote for their work and on a delivery date for the voiceovers. Before talent starts recording make sure that the stakeholders give you direction and approve the voice, pace, inflection, tone, etc.

4. DEVELOPMENT/PRODUCTION

Some of the tasks under this stage can be done concurrently with the tasks in the Storyboarding stage in order to save time.

There are four steps to Development:

1. Create Look and Feel of the e-learning project. Some stakeholders might have a clear idea of what they want, others might give you creative freedom and ask you to help them with coming up with it. Make sure the stakeholders approve the look and feel and navigational elements and placement before developing the course.
2. Determine assets needed - such as graphics, photos, animations and characters.
3. Create assets and have the client approve them.
4. Produce/Develop/Program the course. NOTE: DO NOT BEGIN THIS STEP UNTIL you have approval from the client on the final storyboards, voiceovers, look and feel, and assets.

5. QUALITY ASSURANCE

To assure the quality of the e-learning product you are delivering, you will need to test the course thoroughly at various points. Normally, there are two deliveries of the course: the Alpha delivery (first delivery) and the Beta delivery (final delivery).

1. Upon Alpha delivery of the course, you should test the course against the approved storyboards to make sure that the programmers followed the storyboard instructions accurately.
 - You should create an Alpha test document which will include all of the mistakes or oversights found during your testing. It's a good idea to have multiple people test the Alpha version.
 - If there are only minor oversights and mistakes, you might want to have the stakeholders Alpha test it as well. (Provide them with an Alpha test document so they can document their feedback). If not, wait until the corrections to the Alpha version have been made and then have the stakeholders test the Beta version.

Sample Alpha Test Document

Alpha Test Document

XYZ Customer Service Course

Date 03/12/2008

#	Slide	Description	Change by
1	Global	1) The Exit button is not working. 2) IN ALL COURSES, change the font of the page number tracking to match it to the courses font.	
	Module 1		
2	24	The link to the website is not working. It should open up in a new browser window.	
3	45	xxx	
4	49	xxx	

- Once the corrected version comes back, this is considered the Beta version. Test this version again for yourself before you submit it to the stakeholders. Ideally this is the final version and the stakeholders will come back to you with an approval.

6. INTEGRATION (DELIVERY)

The last step in e-Learning project management is to deliver the finalized e-learning product to the client. The way in which it is delivered depends on client's original request.

The integration/delivery options are:

- Integrate the course with an existing Learning Management System (LMS). This means the content is stored by and delivered by an internal server and can track user access data and scores.
- Integrate the course on an external server. Typically vendors will charge you a monthly hosting and maintenance fee. The fee usually varies based on the amount of bandwidth required to store and run your course. Bandwidth is increased by larger files and the more concurrent users accessing the course.

Conclusion

Managing any project can be complex, although it can be made simpler when managed by a smartly segmented Project Management Schedule.

You will find that precise project management using the proven steps outlined in this document will enable you to improve your project management skills and your final product delivery.

About Facilitador™

Facilitador creates custom training and development programs that leverage the latest eLearning and virtual classroom technology.

Founded in 2001 under the principles that progress cannot exist without knowledge and productivity can be increased through the facilitation of knowledge, its solutions have been implemented in over 100 countries in multiple languages by some of the world's leading organizations.

Facilitador mission is to help its clients and partners solve problems and achieve new levels of human performance.

Many training and development programs tend to forget the most essential key to successful learning transfer: how will the learners actually use the knowledge imparted after the course is taken?

Facilitador's first and foremost concern is how learners will use or apply the knowledge to improve themselves and their company. **Facilitador's** solutions are designed to facilitate the application of knowledge.

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